

Claims Management User Guide – Updated 11.15.10

As a Grantee of an award from IHCD A you may be able to submit claims online using the IHCD A Online (<https://IHCD AOnline.com>) Claims Management site. You can also report your Award Job Hours online.

Submitting Claims

Please note that not all funding programs currently allow electronic claims submission.

1. Login with you user name and password.
 - a. If you need instructions for obtaining a user name and password, see the video entitled *Registering a Username and Password* on the IHCD AOnline Resources and Training Videos page. (<https://ihcdaonline.com/Links.htm>)
2. On your Programs Menu – click ‘Claims Management’

Programs

Owner Certification	This will allow a property manager to complete their Owner Certifications for the RHTC, CDBG, HOME, and Development Fund programs.
Progress Report	This will allow the owner or developer to enter the Semi-Annual 8609 progress report.
Single Family Software Download	Single Family Participating Lenders can download the IHSF software from here to manage their MRB, MCC, DPA, and MSP reservations.
Loan Reservation System	Lenders can create and manage their MSP, Bond, and MCC loan reservations for the Single Family program. This interface is for lenders who are unable to use the full single family software client. This is a simplified interface with only the core features. It is recommended that all participating lenders use the IHSF software (link above) when possible.
IDA	Individual Development Account Administrators can manage their participants and programs through this site.
NAP	Neighborhood Assistance Program. This will allow awardees to enter their quarterly reporting as well as apply for the NAP program during open rounds.
Claim Management	The Claims Management will allow an Awardee to submit claims online for payment. This will work for the majority of IHCD A awards that use a claims process. You will be able to submit claims for any award that your organization is the awardee.

3. What appears next is your list of claims prepared.



Welcome Draw Management User
Test Org

Indiana Housing Online Management System

Logout
Help

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Claim List

Claims management is designed to allow a grantee to submit your request for reimbursement to IHCD A. The list below will allow you to view all of your active claims. The step represents where your claim is in the payment approval process. To add a new claim, click the link on the left. You can only add new claims for awards where your organization is the grantee, while the award is active, and for funding programs that are currently allowing electronic claims.

Once you submit the claim, you may still need to submit your supporting documentation to IHCD A before your claim will be processed. In the future, this site will allow you to attach electronic copies of your supporting documentation as part of the claim.

Click a claim number to view the claim.

My Awards

Claim No	Award No.	Claim Total	Step	Status	Status Date
139	WA-09-0007	\$27,700.01	Claim Reviewed	Approved	9/17/2009
137	T09-01000001		Claim Submitted	Awaiting Approval	9/16/2009
135	0910001	\$15,000.00	Submit Claims on Web	Approved	9/16/2009
134	0910001	\$25,000.00	Submit Claims on Web	Approved	9/16/2009
129	WA-09-0003		Claim Submission by Grantee	Awaiting Approval	9/14/2009

4. You will see the Claim Number, the Award Number, the total amount of each claim, what step in the process the claim is at (for example, Claim Submitted by Grantee, Claim Reviewed, Claim Complete), the status of that step – Awaiting Approval, Approved, etc. and the date of the last status. The claims will be listed by order of claim number with the most recent being at the top.
 - a. Note: The steps that the claim must go through will vary depending upon the funding source.
5. You can search the list for a particular award by clicking on the funnel at the top of the award column.

- a. Type in the award number being sure to put in the dashes. It is not case sensitive.
 - b. Hit the 'Enter' key on the keyboard.
 - c. To un-filter the list – delete the award number and hit the enter key on the keyboard
6. You can sort the Claims List by Claim Number, Award Number, or Step by clicking on the header of the one of those columns.
7. You can change the list of claims to show claims against 'Consulting Claims' by changing the option in the drop-down directly above the claim number.

8. To see the details for a particular claim, click on the Claim Number.

Create a New Claim

Use the 'Create Claim' link to the left of the Claims List to start a new Claim.

You will be prompted to choose the Award against which you want to make a claim. Select the Award from the list. The list will include your active awards. Then click 'Create Claim'.

****Note**** If the award you are looking for is not in the list, there could be several reasons:

- There is an active claim already in progress (only one active claim can be processed at a time for most awards).
- Your organization is not set up as the grantee of the award
- The award is not classified as active with IHCD.

The Claim Detail will include several pages: the Claim Summary page, the Claim Page, the Narrative page, the Vendors page, the Vendor Payments page and the Status page. Navigate through these pages by using the links at the top.

The claims summary page shows info about the current claim as well as previous claims for this award. You can see the budget breakdown for the award, previous draws against line items, and the remaining amount for each line item. If your award is not restricted by budgeted line items, you will see all available line items for your award. If your award requires claims against individual buildings, you will see a list of those buildings along with the line items associated with those buildings.

Line Item	Budget	Previous Claim	Current Claim	Total Claim	Balance to Claim
Short-term Rental Assistance	N/A	\$0.00	\$0.00	\$0.00	\$0.00
Medium-term Rental Assistance	N/A	\$0.00	\$0.00	\$0.00	\$0.00
Security Deposits	N/A	\$0.00	\$0.00	\$0.00	\$0.00
Utility Deposits	N/A	\$0.00	\$0.00	\$0.00	\$0.00

Claim Page

To modify the current claim, click on the 'Claim' link.

Award
Financial Assistance

Remaining Budget: \$5,000.00

Line Item	Total Budget	Remaining Balance	Amount
Bookkeeping/Check Writing	\$0.00	\$0.00	<input type="text" value="50.00"/>
Housing Inspections	\$0.00	\$0.00	<input type="text"/>
Medium-term Rental Assistance	\$0.00	\$0.00	<input type="text"/>
Motel & Hotel Vouchers	\$0.00	\$0.00	<input type="text" value="100"/>
Moving Cost Assistance	\$0.00	\$0.00	<input type="text"/>
Security Deposits	\$0.00	\$0.00	<input type="text"/>
Short-term Rental Assistance	\$0.00	\$0.00	<input type="text"/>
Utility Deposits	\$0.00	\$0.00	<input type="text"/>
Utility Payments	\$0.00	\$0.00	<input type="text"/>

Housing Relocation & Stabilization Services

Remaining Budget: \$400,000.00

Line Item	Total Budget	Remaining Balance	Amount
Case Management	\$0.00	\$0.00	<input type="text"/>
Credit Repair	\$0.00	\$0.00	<input type="text"/>
Housing Search & Placement	\$0.00	\$0.00	<input type="text"/>
Legal Services	\$0.00	\$0.00	<input type="text"/>
Outreach & Engagement	\$0.00	\$0.00	<input type="text"/>

Other

Remaining Budget: \$55,000.00

Line Item	Total Budget	Remaining Balance	Amount
Administration	\$0.00	\$0.00	<input type="text"/>
Data Collection & Evaluation	\$0.00	\$0.00	<input type="text"/>

Comments

Comments about the claim.

Save

The claim page shows info about the current claim for this award. You can see the budget breakdown for the award along with the remaining amount for each line item. Enter the amount you are claiming in the Amount box. If your award is not restricted by budgeted line items, you will see all available line items for your award. If your award requires claims against individual buildings, you will see a list of those buildings along with the line items associated with those buildings.

You may also enter any comments you wish regarding the claim.

Once you have entered your claim amounts and any comments, click the 'Save' button at the bottom of the page.

Narrative Page

Some funding programs require that narratives be submitted along with each claim. If there are narrative boxes on this page, you must complete them prior to submitting the claim.

Claim Vendors page

ARRA funding programs require that vendor expenses be submitted along with each claim. This information is required for vendors as defined by the ARRA rules. Vendors are specific to each award and only need to be entered once for the duration of an award. If you are unsure as to what must be reported under your award with IHEDA, please contact the appropriate IHEDA staff member.

Add a New Vendor to Claim 0910001

Vendor Name:

My Favorite Vendor

DUNS:

You must specify a valid DUNS number for each vendor. If the vendor does not have their own DUNS, the DUNS for your organization will be used in its place.

987654321

☐ Override DUNS

HQ Zip Code:

47970

NAICS Category:

You must specify the North American Industry Classification System code for the services provided by this vendor. If the vendor has provided multiple services, specify the NAICS code that most closely matches the primary service provided.

23 - Construction

NAICS Code:

8310 - Drywall and Insulation Contractors

Description of Services:

Description of service provided.

Add Vendor

To enter the vendor info type in the name of the vendor.

Enter the federally-required Data Universal Numbering System (DUNS) number for the vendor. If the vendor does not have a DUNS number, click the 'Override DUNS' box. The DUNS number should be 9 digits and not used by any other vendors on this claim.

Enter the 5-digit zip code where the vendor's headquarters is located.

Select the North American Industry Classification System code for the services provided by this vendor from the list. If the vendor has provided multiple services, specify the NAICS code that most closely matches the primary service provided. You will need to first select the category and then the more specific code.

Enter a description of the services provided by this vendor.

Click the 'Add Vendor' button to add the vendor to the claim. Everything must be filled in before you can save.

Once added, the vendors for this claim will be listed in the 'Manage Vendors' area at the bottom of the page.

Manage Vendors for Claim 0910001						
Vendor Name	DUNS	Zip Code	NAICS Category	NAICS Code	Description of Services	
My Favorite Vendor	987654321	47970	23 - Construction	8310 - Drywall and Insulation Contractors	Description of service provided.	Edit Delete


You can click the 'Edit' button to the right of the vendor's info to make changes to any of the information.

You may delete the Vendor by using the 'Delete' button also to the right.

Vendor Payments Page

Once you have Vendors added to the Claim, you will need to enter the payments you have made to the Vendor. Do this on the Vendor Payments page.

Add a New Expense for Claim 0910001	
Vendor:	<input type="text" value="My Favorite Vendor"/>
Expense Date:	<input type="text" value="8/31/09"/>
Expense Amount:	<input type="text" value="1235.75"/>
You may select a Program Line Item to associate with this expense.	
Item Group:	<input type="text" value="Housing Relocation & Stabilization Services"/>
Line Item:	<input type="text" value="Housing Search & Placement"/>
Document ID:	<input type="text" value="12-350"/>
Expense Description:	<input type="text" value="Description of the expense"/>
<input type="button" value="Add Expense"/>	



To add a payment, select the Vendor. Then enter the Expense Date and Amount. Item Group and Line Item are optional, select as required by the funding program. You may also enter a Document ID and an Expense Description. Then click 'Add Expense'.

Once you have payments added, they will be listed at the bottom of the screen in the 'Manage Expense' area. From there you can Edit or Delete an individual expense.

Manage Expense Information for Claim 0910001							
Vendor Name	Expense Date	Expense Amount	Document ID	Expense Description	Item Group	Line Item	
My Favorite Vendor	1/1/2009	\$50.00			Housing Relocation & Stabilization Services	Credit Repair	Edit Delete
My Favorite Vendor	1/2/2009	\$150.00					Edit Delete
Total Expenses for This Claim to All Vendors:				\$200.00			

Award Job Hours Page

On the Award Job Hours page, enter the number of hours for job-positions that were ‘created’ with stimulus funds and the number of hours for job-positions that were ‘retained’ with stimulus funds for this claim. Enter the hours in the construction category and non-construction category. Click the ‘Edit’ button to enter the hours. Click the ‘Update’ button to save. Alternatively the Award Job Hours may be entered by clicking the [Manage Award Job Hours link](#). Job information should be entered monthly and must be completed before the third day after the quarter ends.

Job Hours
0910001

Reporting Period	Construction Hours Created	Construction Hours Retained	Non-Construction Hours Created	Non-Construction Hours Retained		
September 2009	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Update	Cancel
August 2009	0.00	0.00	0.00	0.00		Edit
July 2009	0.00	0.00	0.00	0.00		Edit

Submitting the Claim and Receiving a Receipt (Summary Page)

Once you have entered all the information, you will need to submit the claim. Go to the Summary page and hit ‘Submit’ at the bottom of the page.

If everything is complete, you will receive a receipt for the claim. You can also print the receipt later by clicking the ‘Print Receipt’ button. An Authorized Signor needs to originally sign the claim form and keep it in your records.

To finalize the claims process you will need to create a PDF of the signed claim form and all required back up documentation. The claim will not be processed until this PDF is uploaded and received by IHCD. See below.

Uploading Supporting Claim Documentation

Overview

Users have the ability to upload documentation required when submitting claims through IHCDOnline starting **December 1, 2010**. For example, a signed claim receipt can be uploaded and sent to IHCD after submitting the claim eliminating the need to send the signed receipt via mail. Once documents have been submitted, users will have the ability to view those documents associated with the claim that was submitted.

Process for Submitting Documentation

Step 1: In order to submit a claim receipt or other supporting documentation for a weatherization claim the user will need to select the claim receipt from the claim list.

Award Claim List

Claims management is designed to allow a grantee to submit your request for reimbursement to IHCD. The list below will allow you to view all of your active claims. The step represents where your claim is in the payment approval process. To add a new claim, click the link on the left. You can only add new claims for awards where your organization is the grantee, while the award is active, and for funding programs that are currently allowing electronic claims.

Once you submit the claim, you may still need to submit your supporting documentation to IHCD before your claim will be processed. In the future, this site will allow you to attach electronic copies of your supporting documentation as part of the claim.

Note that a status of 'Awaiting Approval' means that the claim has not passed that step yet. If the step is 'Claim Submitted by Grantee' and the status is 'Awaiting Approval', you have not yet submitted this claim for payment.

Click a claim number to view the claim.

My Awards

Receipt No. ▼	Award No. ▼	Award Amount	Claim Total	Step	Status	Status Date
415	IDA-11-001 IDA TEST Organization 1	\$16,500.00	\$0.00	First	Awaiting Approval	8/26/2010
333	WA-09-0000 IHCD	\$1,000,000.00		Claim Submission by Grantee	Awaiting Approval	7/2/2010

Step 2: A new link 'Supporting Documentation' will appear for the user to select.



[Summary](#) | [Claim](#) | [Narrative](#) | [Vendors](#) | [Vendor Payments](#) | [Claim Status](#) | [Award Job Hours](#) | [Supporting Documentation](#)

Claim Summary
WA-09-0000
Claim Receipt: 333
IHCD

The claims summary displays the information about previous and existing claims for this award. You can see the budget breakdown for the award, previous draws against line items, and the remaining amount for each line item. If your award is not restricted by budgeted line items, you will see all available line items for your award. If your award requires claims against individual buildings, you will see a list of those buildings along with the line items associated with those buildings. To modify the current claim, click on the 'Claim' link above.

Award Amount: \$1,000,000.00

ARRA

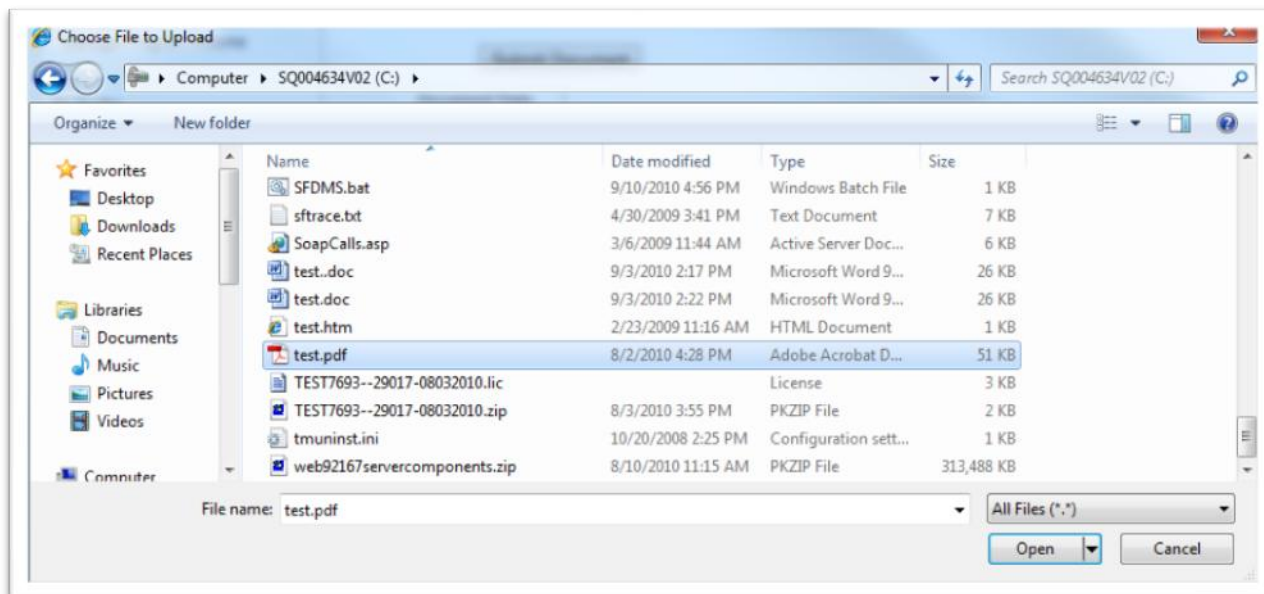
Step 3: The user will need to save a copy of the claim receipt and supporting documentation as a PDF on his/her computer and browse for the folder where it was saved. If any other documentation has been uploaded the user will be able to see it displayed in a grid view.

[Summary](#) | [Claim](#) | [Narrative](#) | [Vendors](#) | [Vendor Payments](#) | [Claim Status](#) | [Award Job Hours](#) | [Supporting Documentation](#)

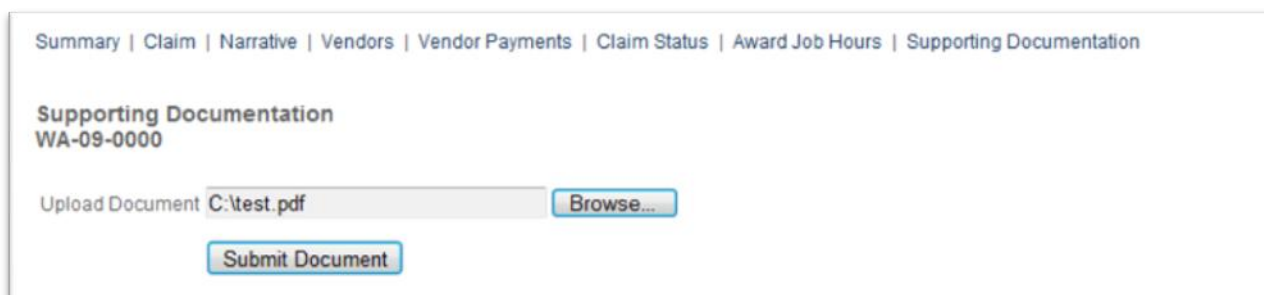
Supporting Documentation
WA-09-0000

Upload Document

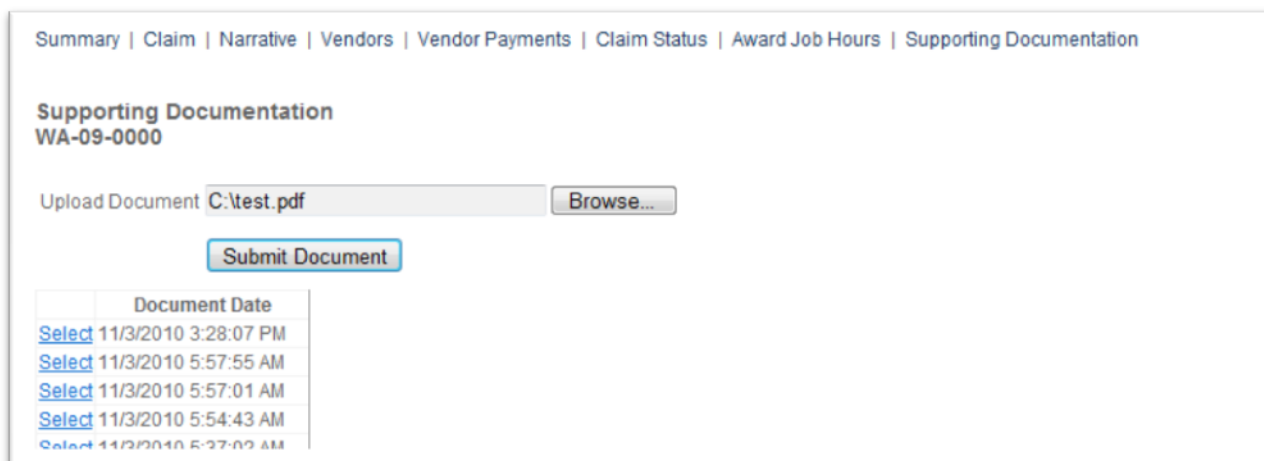
	Document Date
Select	11/3/2010 3:28:07 PM
Select	11/3/2010 5:57:55 AM
Select	11/3/2010 5:57:01 AM



Step 4: The file name should appear in the 'Upload Document' field and the user will need to select the 'Submit Document' button in order to send it to IHCD. This finalizes the process



Step 5: In order to view the documents that have already been uploaded select the 'Select' button in the grid view displayed below the 'Submit Document' button.



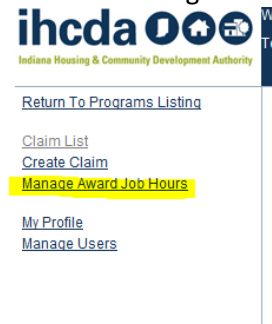
Managing Award Job Hours

For each award under the Recovery Act, IHCD is required to report information on the job-positions created and the job-positions retained. This information will be collected on a monthly basis and must be submitted no later than 5 days after the end of the quarter. You will need to report the total hours worked by all employees whose job was either created or retained due to this award. For employees that have multiple duties and only a portion of this project funded

those duties, only report on the hours directly related to this award. If your organization has multiple awards, you must report the employee hours that are directly related to each award separately.

Job information should be entered monthly and must be completed before the third day after the quarter ends.

Click the Manage Award Job Hours link to enter Job Hours for an award.



You must then select the award for which you wish to enter hours.

A screenshot of a web form showing a dropdown menu for 'Award Number:'. The dropdown is open, displaying a list of award numbers: '09-04-0001', '0910001', '1231', '12321414', and '09-08-0001'. The first option, '09-04-0001', is currently selected.

Click the 'Edit' button to enter the hours. Click the 'Update' button to save. Note if you have entered hours as part of a claim, those hours will be displayed.

A screenshot of the 'Job Hours' entry interface for award '0910001'. It features a table with columns for 'Reporting Period', 'Construction Hours Created', 'Construction Hours Retained', 'Non-Construction Hours Created', and 'Non-Construction Hours Retained'. The first row is for 'September 2009' and contains input fields with '0.00' in each, followed by 'Update' and 'Cancel' buttons. The second row is for 'August 2009' with '0.00' values and an 'Edit' button. The third row is for 'July 2009' with '0.00' values and an 'Edit' button.